

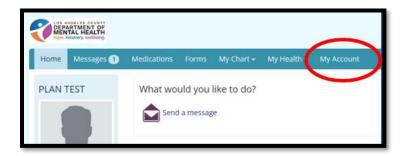
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## How to Set Up a Proxy

(a person whom you are granting access to your account)

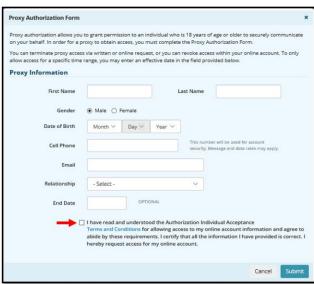
• In your Client Portal, select My Account



• Select Add a proxy account



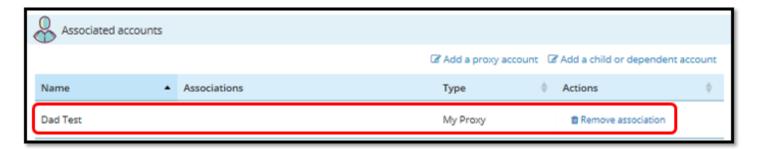
• Complete the Proxy Authorization Form and select Submit



• The Proxy will get an email to accept and verify the proxy process



• When the Proxy completes the verification process, then he/she will have access to the client's online record.



 The Proxy would then log in with their username and password and select Switch account under their photo and click on the client's account.

